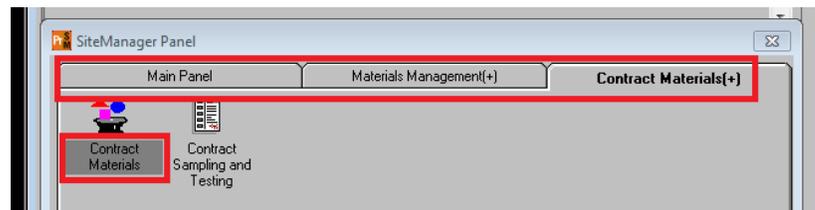
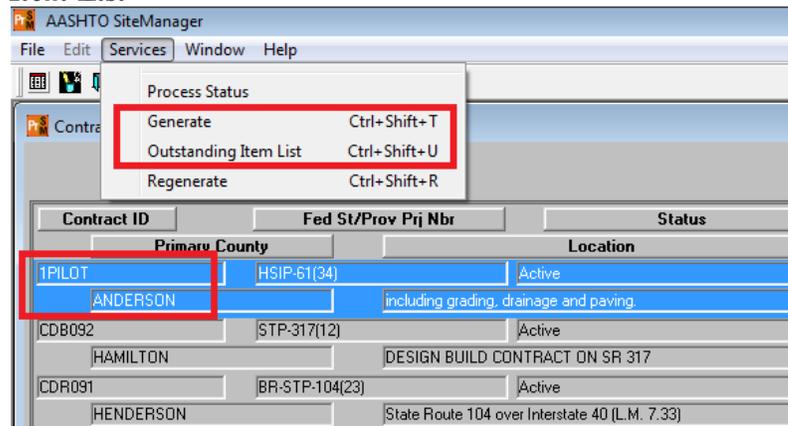


Contract Activation and materials generation Procedure

1. When HQ - Finance Staff (TDOT Finance) activates contract a Database trigger [Customization: MTC022] sends an email that notifies REG - M&T Supervisor, ADMIN - M&T Regional Support, ADMIN - Operations Regional Support, and FIELD - Operations Office Staff personnel that the contract has been activated.
2. REG - M&T Supervisor runs the **Outstanding Item List report** to identify any remaining outstanding items. These are items that have no materials (not even 999.99.999 or 000.00.000). Usually new items that have not had materials identified on the Global level.
 - i. Navigate to **Contract Material** window of SiteManager:



- ii. Select contract. Then from the **Services** window select **Outstanding Item List**



- iii. **Note: Report prints to default printer as soon as Outstanding Item List is selected from menu.** To print to a PDF, set your default printer to a PDF writer.

3. If any items appear on the list, REG - M&T Supervisor sends the list to the **TDOT.SiteManagerMaterials@tn.gov** email address for the recipients to identify the roles responsible for defining the global sampling and testing requirements for the outstanding items on the contract.

4. If the Outstanding Item List report is blank, REG - M&T Supervisor generates contract materials.
5. Next we will generate contract materials using the same window:
 - i. Make sure you have selected the contract you want to generate materials for in the *Contract Materials* window
 - ii. From the *Services* menu select *Generate*
 - iii. Contract will automatically be removed from list and materials with global S&T requirements are linked to all contract items.
6. Immediately after generating contract materials, run BOE report *RR005 – Materials Sampling Checklist*.
 - i. Select your contract.
 - ii. Select ALL Project Numbers
 - iii. Select ALL items
 - iv. Select “Y” in the “Only Display data for 999 Materials” drop down box
 - v. Select OK button and report will open.

TDOT BOE 3.1 Test System

Home Document List Open Send To Dashboards

View - Materials Sampling Checklist: RR005_TSMR

Enter prompt values.

Select Contract, Project Numbers and Item Codes

Select Contract (Required):

4PILOT

Select Project Number (Required):

Available Values: 36001-3290-14

Selected Values: 36001-3290-14

Select Item (Required):

Available Values: 203-01, 203-01.03, 203-01.79, 203-02.01, 203-50, 203-50.01, 204-10.01, 204-10.02

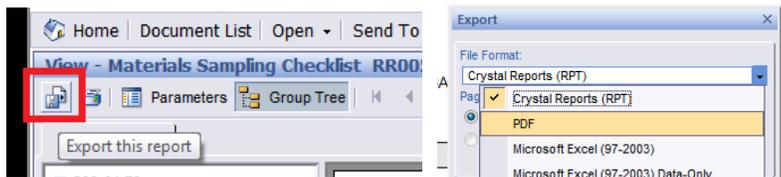
Selected Values: 203-01, 203-01.03, 203-01.79, 203-02.01, 203-50, 203-50.01, 204-10.01, 204-10.02

Only Display data for 999 Materials: Y/N

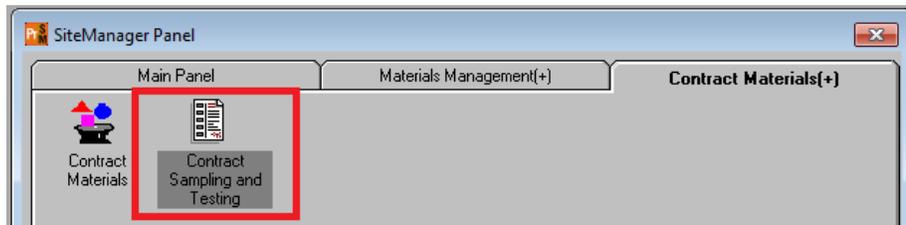
Y

OK

7. Select the *Export this report* button and export to PDF.



8. We now open the *Contract Sample and Testing Requirements* window:



9. Find each item on report RR005 by matching the "Line Item Number"

Item
Contract: 4PILOT **Project Number:** 36001-3290-14
Item Code: 209-03.55 **Item Unit:** Each
Item Description: STREAM MITIGATION (DESCRIPTION)
Category Number: 0100 **Line Item Number:** 0470
Material Code: 999.99.999 **Material Name:** No Test Assigned

Requirements (Testing)
Sample Type: Information Only
Acceptance Method: Information Only
Test Method Description: M020 - Visually Accepted

Select Contract/Material Information

Selection
Contract: 4PILOT
Project/Line Item: 36001-3290-14, 0460, STREA

Find:

Project/Line Item

Project Number	Line Item Number	Proposal Line Number	
36001-3290-14	0460	0 00	STREA
36001-3290-14	0470	0 10	STREA
36001-3290-14	0480	0 20	STREA
36001-3290-14	0490	0 30	STREA
36001-3290-14	0500	0 40	PLACIN
36001-3290-14	0510	0 50	SEDIME

OK Cancel

In the *Contract Sample and Testing Requirements* window, REG - M&T Supervisor associates the proper materials in place of the placeholder material to the contract item, sets the conversion factor, and associates appropriate tests.

10. REG - M&T Supervisor deletes the placeholder material, **999.99.999 – No Test Assigned** from the Contract Sample and Testing Requirements window.

Contract Sample and Testing Requirements

Materials Sample and Testing

Contract: 4PILOT **Project:** 36001-3290-14 **Line Item Nbr:** 0350 **Bid Item Code:** 203-01.79
Item Unit: C.Y.
Proposal Line Nbr: 0370
Desc. 1: EXCAVATION/BACKFILL
Desc. 2:
Supp Desc1:
Supp Desc2:

Material Code	Material Full Name	Status	Material Short Name
999.99.999	No Test Assigned	A	No Test Assigned

Material Code: 999.99.999 No Test Assigned
Conversion Factor: 1.00000 **Approved Source Required**
Material Quantity: 25.000 **Material Unit:** NO UNIT(S) SELECTED
Special Instruction:

11. Next the correct material(s) and test(s) need to be added to the item.
 - i. Click the "New" icon at the top of the window.

- ii. Enter material code, conversion factor, and Special Instruction (special instruction is optional) and save. NOTE: use zero conversion factor if you do not want money withheld from the contractor if all tests are not performed.

Contract Sample and Testing Requirements

File Edit Services Window Help

Materials Sample and Testing

Contract 4PILOT Project 36001-3290-14 Line Item Nbr 0350 Bid Item Code 203-01.79

Item Unit C.Y.

Proposal Line Nbr: 0370

Desc. 1: EXCAVATION/BACKFILL

Desc. 2:

Supp Desc1

Supp Desc2

Material Code	Material Full Name	Status	Material Short Name
205.04.001	Embankment Material (Unclassified)		Unclass Embankment

Material Code: 205.04.001 Embankment Material (Unclassified)

Conversion Factor: 1.00000 Approved Source Required

Material Quantity: Material Unit: Cubic Yard

Special Instruction: Sample must be sent to M&T lab for testing before use

- iii. Next, click on the *Sample and Testing* tab. Select the new icon and enter data for each test that will be required for the material.

Contract Sample and Testing Requirements

Materials **Sample and Testing**

Contract: 4PILOT Project: 36001-3290-14 Line Item Nbr: 0350 Bid Item Code: 203-01.79
 Item Unit: C.Y.
 Proposal Line Nbr: 0370
 Desc. 1: EXCAVATION/BACKFILL
 Desc. 2:
 Supp Desc1:
 Supp Desc2:

Material Code	Material Full Name	Status	Material Short Name
205.04.001	Embankment Material (Unclassified)		Unclass Embankment

Producer Supplier Code	Sample Type	Acceptance method	Test Method
	Information Only	Information Only	T100
	Information Only	Information Only	T88
	Information Only	Information Only	T89
	Information Only	Information Only	T99

Producer Supplier Code:
 Sample Type: Information Only
 Acceptance Method: Information Only
 Test Method: T99 T99 - Moisture-Density Relations of Soils
 Sample Location: Placement Site Rate: 1 Samples per.: 99,999,000
 Sample Units: Sample Size:
 Sample Responsibility: Project Inspector
 Test Responsibility: Region Lab

- iv. Repeat this process for additional materials linked to the item. Save.
 - v. Continue the previous steps for all items with the 999.99.999 material code.
12. Once all instances of items with **999.99.999 – No Test Assigned** have been addressed, the REG - M&T Supervisor enters the *Contract Materials Ready* key date.

- i. Navigate to the Key Dates window: Main Panel/Contract Administration/Contract Records/Key Dates



- ii. Enter the date this task was completed:

The screenshot shows the 'Key Dates' window for Contract ID: 4PILOT. It features a table with columns for 'Key Date Type', 'Projected Date', 'Actual Date', 'Required to Activate', and 'Required to Finalize'. The 'Contract Materials Ready' row is highlighted in blue. Below the table, there are input fields for 'Key Date Type' (set to 'Contract Materials Ready'), 'Projected Date' (00/00/00), 'Actual Date' (00/00/00, highlighted with a red box), 'Distribution List', 'Message Text', 'Required to Activate', and 'Required to Finalize'.

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
CC-3	00/00/00	00/00/00	N	N
Completion Notice (Date Time Stopped)	00/00/00	00/00/00	N	N
Final Inspection	00/00/00	00/00/00	N	N
Final Records Submittal	00/00/00	00/00/00	N	N
DT1696 Materials and Tests Certification	00/00/00	00/00/00	N	N
Notice of Termination	00/00/00	00/00/00	N	N
Starting Notice	00/00/00	00/00/00	N	N
Contract Materials Ready	00/00/00	00/00/00	N	N